

CHAPTER 30



WORKING REMOTELY WITH EXCHANGE SERVER

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USING OUTLOOK AND EXCHANGE OFFLINE

If you use Outlook 2003 primarily on one computer, at the office, this chapter is probably not for you. However, a large number of people use Outlook 2003 in multiple locations, such as the office, home, in a hotel, or even on a cruise ship (yes, I've actually used Outlook on a cruise ship). If you travel for business, you might take a laptop with you when you travel and establish a connection to your corporate network from wherever you happen to be that day.

When traveling out of the office, you need a method to connect Outlook to your corporate Exchange Server. You can use Outlook when out of the office in several ways:

- Using offline access to Exchange
- Using Cached Exchange mode
- Using Remote Mail
- Using RPC (Remote Procedure Calls) over an HTTP connection

This chapter will cover each of these options in detail.

OFFLINE ACCESS VERSUS REMOTE ACCESS

Using Outlook in offline mode and using remote access are actually two different scenarios. Think of them as two sides of the same coin. When you work offline with Outlook, you don't have any sort of connection to your Exchange Server. You might not have any network connection at all, or you might be connected to a network that isn't your own. You have no interaction with the messages actually stored on your Exchange Server and instead are working with only messages stored on your local computer. You can perform just about any operation on any message stored in your Offline Folders file. You can read messages that have been downloaded to your Offline Folders file, reply to those messages, compose new messages, delete messages, and work with all the rest of your Outlook data including contacts, tasks, journal, notes, and calendar items. When you connect to the server at a later time, you move into online mode. All the changes you made when you were working offline are synchronized to the server. Messages you deleted from your Offline Folders file are removed from the server, messages waiting in your Outbox are sent, and messages that you received while you were offline are downloaded to your computer.

Remote access to Exchange requires you to actually be connected to the server. That connection could be over a dial-up connection in a hotel room, a VPN connection over another network, or an HTTP connection from your local coffee shop or airport. When you're connected to Exchange and using the remote mail features, you can preview message headers without actually downloading messages. Much like using cached mode in slow mode, you can download all of your headers and work with only them. You can mark items for download, delete items, and reply to items all without downloading the full text of the message and its attachments. Remote mail can be very useful if you receive a large number of messages when you're away from the office. It can also be helpful if Aunt Irma keeps sending

you very large emails with multiple pictures of her cats when you're out of the office and connected over a cellular modem. You can process the headers and decide which messages you want to download, which messages you want to delete, and which messages you want to leave on the server for retrieval when you return to the office and are on a high-speed connection again.

NOTE

Some of the information contained in the sections that follow pertain to administrators only. If you're unsure of how to follow any of these procedures and you are not a network or systems administrator, be sure to contact the appropriate person within your organization before proceeding.

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CONFIGURE A REMOTE CONNECTION TO EXCHANGE

You can choose from the following methods to establish a remote connection to your Exchange Server:

- **Dial-Up Connection Using RRAS to Your Windows 2000 Server**—Using Routing and Remote Access Services (RRAS) on a Windows 2000 server, you can enable remote users to dial in to the network using a modem. You can install RRAS on your Exchange Server or any other Windows 2000 or Windows 2003 server on your network. You can customize the level of access dial-in users have to network resources.
- **Virtual Private Network (VPN) Connection to Your Network Through the Internet**—You can install Microsoft VPN services on one of your Windows 2000 servers and enable clients to connect using a VPN over the Internet. This is probably one of the most secure methods for allowing remote access to your network.
- **NEW** **RPC over HTTP**—If your network includes an Exchange 2003 server, a Windows 2003 server, and your clients are all Windows XP SP1 with Outlook 2003, you can use a new method of connecting Outlook to your Exchange Server. You'll need to install a HotFix for Windows XP SP1. That HotFix can be found at <http://support.microsoft.com/default.aspx?scid=kb;en-us;331320>. This method works only with the preceding configuration, but it can enable your clients to establish a secure connection to the server over any Internet connection. Using remote procedure calls (RPCs) over HTTP, your computer can talk to the Exchange Server just as if it were back in the office plugged into the LAN.

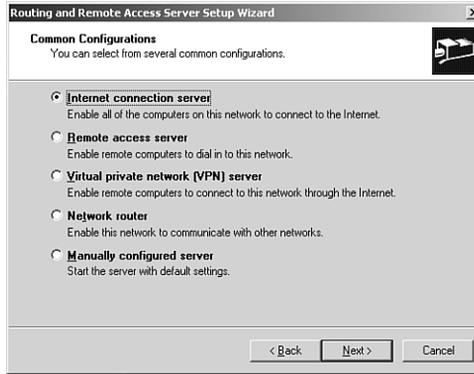
RRAS

Configuring an RRAS connection to a Windows 2000 or Windows 2003 network is fairly straightforward. To enable and configure RRAS, use the following steps:

1. On your Windows 2000 Server, choose Start, Programs, Administrative Tools, Routing and Remote Access to open the RRAS console.
2. Expand the top-level branch on the left pane to locate the server you want to use for RRAS.

3. Right-click the server name and choose Configure and Enable Routing and Remote Access. This will start the Routing and Remote Access Server Setup Wizard.
4. Click Next through the first screen of the setup wizard to display Figure 30.1.

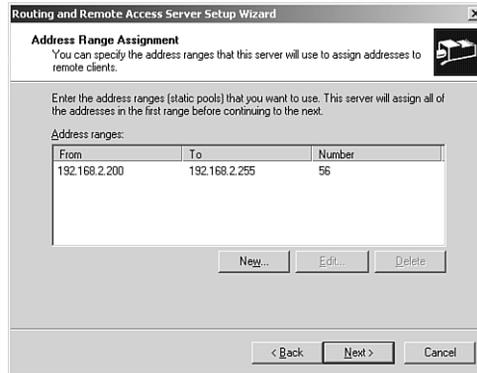
Figure 30.1
You can choose the type of RRAS server you want to configure.



5. Choose the type of RRAS server you want to configure. For these instructions, choose Remote Access Server and click Next.
6. Choose the protocol you'll support for remote clients. Any protocols you need that aren't listed must be installed on the server before you can select them. If all the required protocols are listed, ensure that Yes, All of the Required Protocols Are on the List is selected and click Next. Otherwise, choose No, I Need to Add Protocols and click Next. This choice requires you to exit the Routing and Remote Access Server Setup Wizard and install the required protocols before continuing.
7. Choose whether the server assigns IP addresses automatically, or manually "from a specified range of addresses." If you use a DHCP server, you can choose either of these options. If you choose automatically, the DHCP server will assign addresses from its pool. However, you can still use a manual IP address assignment from a specified range of addresses even with a DHCP server. Simply specify a range of addresses outside of your normal DHCP scope. Click Next when you have made your choice.
8. If you chose to use a specified range of addresses, you must enter an address range as shown in Figure 30.2. Click New to enter a new range or Edit to edit a range. Click Next when you've finished configuring an IP address range.
9. If you have multiple remote access servers on your network, you can configure this server to use a Remote Authentication Dial-In User Service (RADIUS) server to provide centralized authentication and accounting. If you choose to set up this server as a RADIUS server, you must specify a shared secret—a password used by all RRAS servers to authenticate on the RADIUS server. For this exercise, choose No, I Don't Want to Setup This Server To Use RADIUS Now and click Next to display the final confirmation screen. Click Finish to complete your setup.

Figure 30.2

You can use this screen to add, edit, and remove IP address ranges from the pool available to your clients.

**NOTE**

Setting up a RADIUS server is beyond the scope of this book. For more information about setting up a RADIUS server, see a book on Windows 2000 Server or Windows 2003 Server, such as *Special Edition Using Windows 2000 Server* published by Que.

After you've configured the RRAS server, you can manage it through the Routing and Remote Access MMC. You can view connected clients and available ports, configure remote access policies, and view the remote access log files. For more information about configuring RRAS on Windows 2000, see the previous note.

VPN

Configuring a VPN connection through Microsoft Virtual Private Networking services is very similar to configuring RRAS on a Windows 2000 Server. In fact, you can use many of the same steps that were used to configure RRAS. If you haven't configured RRAS yet, you can use steps 1 through 4 in the previous section to begin the VPN configuration. Choose Virtual Private Network (VPN) Server from the Common Configurations screen shown in Figure 30.1 and click Next. Confirm that the available protocols have been installed and click Next.

You need to choose the Internet connection this server uses. To serve as a VPN server, you must have two available connections available. If you have only one connection available, Windows informs you that you cannot continue. If you have more than one Internet connection available, choose one of the connections and click Next. Continue with steps 7 through 9 in the previous section to complete the setup of your VPN server.

RPC OVER HTTP

Outlook 2003 introduces a new method of access to Exchange Server: RPC over HTTP. These acronyms are a fancy way of saying that Outlook 2003 uses remote procedure calls to communicate with Exchange Server 2003 over the Internet. This method of connecting to Exchange can eliminate the need to set up a VPN server or an RRAS server. However,

there are several limitations you must consider when evaluating whether to enable RPC over HTTP.

First, you can use RPC over HTTP only if your network includes the following setup:

- Windows 2003 Server
- Exchange Server 2003
- Windows XP SP1 + 331320 Patch clients with Outlook 2003

NOTE

You can download and install the Windows XP SP1 patch at <http://support.microsoft.com/default.aspx?scid=kb;en-us;331320>.

There are security enhancements with Windows 2003, Exchange Server 2003, and Windows XP SP1 (plus a patch) that make RPC over HTTP possible. Without this configuration, there's no way to ensure adequate security for this protocol. If your network is currently set up this way, you can enable RPC over HTTP on your Exchange Server 2003 with only a few steps.

When you deploy RPC over HTTP, you have a couple of options to choose from for the configuration of your Exchange Server and RPC proxy server. You can configure your Exchange Server as an RPC proxy server, or you can use Internet Security and Acceleration (ISA) Server to serve as your RPC proxy server. No matter which choice you make, the RPC proxy server then specifies which ports to use to communicate with the domain controllers, global catalog servers, and all Exchange servers that the RPC client needs to communicate with.

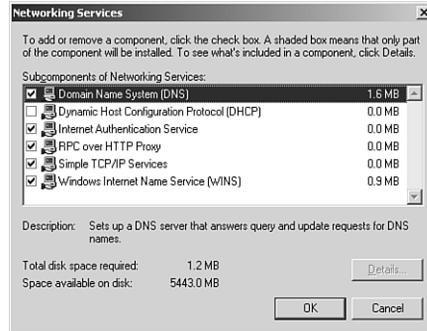
NOTE

Microsoft's official recommendation for deploying RPC over HTTP is to use ISA Server as your RPC proxy server. This provides even more security than simply using your Exchange server as your RPC proxy server. For more information about configuring an RPC proxy server, see the Exchange 2003 Web site at <http://www.microsoft.com/Exchange>.

To configure your Exchange 2003 Server as an RPC proxy server, use the following steps:

1. On the server, click Start, Control Panel, and Add or Remove Programs.
2. Click the Add/Remove Windows Components icon in the left pane of the Add or Remove Programs page.
3. Highlight Networking Services and click the Details button to display Figure 30.3.
4. Check the box next to RPC over HTTP Proxy and click OK.
5. Click Next to install the RPC over HTTP proxy component.

Figure 30.3
Check RPC over HTTP
to install the RPC
proxy server.



Now you'll need to configure the virtual directory in IIS (Internet Information Services). Use the following steps to configure the virtual directory:

1. Click Start, All Programs, Administrative Tools, and select Internet Information Services (IIS) Manager.
2. Expand the Web Sites folder, and then expand Default Web Site.
3. Right-click the RPC Virtual directory and choose Properties.
4. Choose the Directory Security tab and click Edit in the Authentication and Access control pane.
5. Disable Anonymous access in the Authentication Methods window.
6. In the Authentication access pane, choose Basic authentication if your RPC proxy server is either inside the perimeter network or within the corporate network. Click OK, Apply, and OK. Choose Integrated Windows authentication if your RPC proxy server is outside the network firewall.

You're now ready to configure ports for the RPC clients (Outlook 2003) to use to access Exchange Server. To configure ports, open the Registry Editor and navigate to the following key:

```
HKEY_LOCAL_MACHINE\Software\Microsoft\Rpc\RpcProxy
```

Right-click the Valid Ports Registry key and choose Modify. In the Edit String window enter the following data:

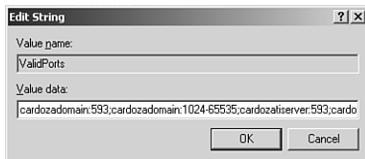
```
ExchangeServer:593;ExchangeServer:1024-65535;  
DomainController:593;DomainController:1024-65535
```

You must replace *ExchangeServer* with the NetBIOS name of your Exchange 2003 Server and *DomainController* with the NetBIOS name of your domain controller. Your Edit String dialog box should now look similar to Figure 30.4.

Save your changes and you should be ready to configure Outlook 2003 to access Exchange Server 2003 using RPC over HTTP.

Figure 30.4

Use these values to configure valid ports for RPC over HTTP access.



In addition to the setup you must perform on the server, you must take several steps on the client in order to use RPC over HTTP. First, you must make sure that you're running Windows XP SP1. After that, you need to install hotfix Q331320, which can be found through the Windows Update site. RPC over HTTP won't run without this hotfix.

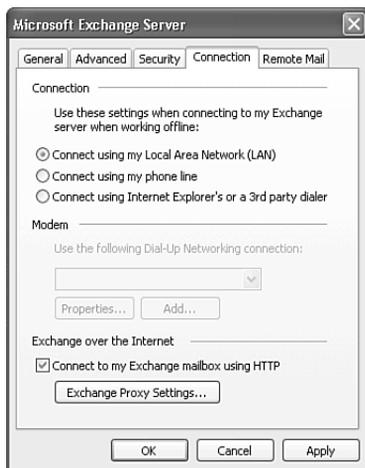
After you've made sure that your computer meets these requirements, you're ready to configure Outlook 2003. It's best if you first configure an Exchange account on the network and connect to your mailbox at least once. Although it isn't officially required to configure RPC over HTTP, I've found that there are significantly fewer errors this way.

Select **T**ools, **E**mail **A**ccounts, **V**iew or **C**hange Existing Email Accounts to display the Email Accounts screen. Choose your Exchange account and click **C**hange to edit its properties.

Click **M**ore Settings to display the Microsoft Exchange Server dialog box. Click the **C**onnection tab to display Figure 30.5.

Figure 30.5

Use the Connection tab to tell Outlook to connect over HTTP.



Click the check box marked **C**onnect to My Exchange Mailbox Using **H**TTP. Click the **E**xchange Proxy Settings button to display Figure 30.6.

Enter the server name or IP address you use to communicate with your Exchange RPC proxy server from the outside world. If you want to always connect using SSL, check the box marked **C**onnect Using **S**SL Only and choose whether you would like to **M**utually

Authenticate the Session When Connecting with SSL. If required, enter the principal name for the proxy server.

Figure 30.6
Use the Exchange Proxy Settings dialog box to configure your server name.



If you want to connect over the LAN after you authenticate over HTTP, check the box marked Connect Using HTTP First, then Connect Using My Local Area Network (LAN).

You need to also choose an authentication method. You can use NTLM authentication or basic authentication. If you use basic authentication, you must use SSL to communicate.

Click OK to save your changes and then click OK, Next, and Finish to return to Outlook. You need to restart Outlook to finish the configuration.

The next time you start Outlook, you should be able to authenticate and connect using RPC over HTTP.

CONFIGURING OFFLINE ACCESS TO EXCHANGE

After you've set up your Exchange Server and Windows 2000 or Windows 2003 Server to accept remote access clients through RRAS, VPN, or RPC over HTTP, you must configure Outlook to work offline. This task can be relatively easy or very complicated, depending on your particular needs and your particular Outlook setup. The next few sections walk you through the various scenarios for configuring Outlook for offline access.

USING CACHED EXCHANGE MODE



Outlook 2003 introduces a new method of connecting to the Exchange Server: Cached Exchange mode. Using Cached Exchange mode, Outlook configures an Offline Folders file that's used to store a copy of the data stored on the Exchange Server. In some ways, Cached Exchange mode is similar to working with a Personal Folders file. Messages are stored on your local computer so that if the connection to the Exchange Server is severed through a faulty connection or the decision to work offline, you can continue to access your messages. You can compose new messages, work with contacts, tasks, journal entries, notes, and create

appointments. You can delete messages, flag them for follow up, and move them to other folders.

If you're using Cached Exchange mode, you might not even need to worry about configuring offline access to Exchange. For example, consider the following scenario: Christine is the Customer Service manager for a large organization. She works long hours at the office and even longer hours at home. However, Christine has a dog, and must be home every night to walk it. So, she always leaves the office at 6 p.m., no matter what she has left to do for the day. She carries a laptop with Outlook 2003 in Cached Exchange mode. After Christine walks the dog, she boots her laptop and reads all the email she received that afternoon. She can respond to the email, compose new emails, plan her day for tomorrow, and mark off tasks she completed during the day today. She does all of this while working with her Offline Folders file in Cached Exchange mode. Because her department closes at 5 p.m. and doesn't reopen until 7 a.m. the next morning, Christine rarely receives any email in the evenings. So, she doesn't really need to worry about configuring offline access to Exchange. Cached Exchange mode works wonderfully for her situation.

If you don't need a live connection to the Exchange Server when you're out of the office, using Cached Exchange mode is probably a sufficient offline solution. Simply make sure that your synchronization mode is set to Full Items, rather than Headers Only, and your local copy of your mailbox will always remain up to date while you're connected. When you start Outlook without a connection to your Exchange Server, Outlook seamlessly moves into offline mode and you can work with the local copy of your messages performing any Outlook task. The only feature you lose when working with Cached Exchange mode in a disconnected state is the ability to view free/busy data for others in your organization.

CONFIGURING OFFLINE ACCESS TO EXCHANGE

There are a few scenarios in which Cached Exchange mode probably won't meet your needs. If you have a very large mailbox and a very small amount of storage space on your laptop or Tablet PC, you might not want to synchronize your entire message store between the server and your client machine. Some of the new Tablet PCs have very small hard drives of only 10 or 20GB. Even some laptops as new as 2 years old have only 10GB hard drives. If you have a 5GB mailbox, you might not want to synchronize all 5GB down to your laptop or Tablet PC.

NOTE

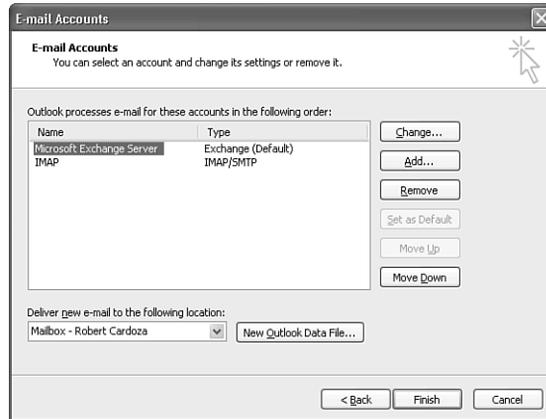


A 5GB mailbox is a very large mailbox. Prior to Outlook 2003, you couldn't create a Personal Folders file or Offline Folders file larger than about 1.8GB. However, with the new Unicode Personal Folders file format available with Outlook 2003, you can now have Personal Folders files and Offline Folders files of greater than 30GB. The official limit is somewhere in the terabyte range. Depending on your corporate policies, you may or may not be able to create a mailbox as large as 5GB, but I've seen larger.

If you aren't using Cached Exchange mode, you can configure strictly offline access to Exchange. To configure offline access to Exchange, select **T**ools, **E**mail **A**ccounts. Choose **V**iew or **C**hange Existing Email Accounts, and click **N**ext to display Figure 30.7.

Figure 30.7

Use this dialog box to make changes to your Exchange email account settings.



Choose your Exchange account and click **C**hange. On this screen, click **M**ore Settings, click the **A**vanced **T**ab, and then click the **O**ffline **F**older **F**ile **S**ettings button to display Figure 30.8.

Figure 30.8

The Offline Folder File Settings dialog box tells you the location of your Offline Folders file.



This dialog box enables you to specify a location for an Offline Folders file. An Offline Folders file is much like a Personal Folders file. You can choose where on your hard drive to store the file and you can choose an encryption setting. Click **O**K to save your changes. Outlook will ask you if you want to create a new Offline Folders file. Click **Y**es to create your new file. Click **O**K, **N**ext, and **F**inish to return to Outlook.

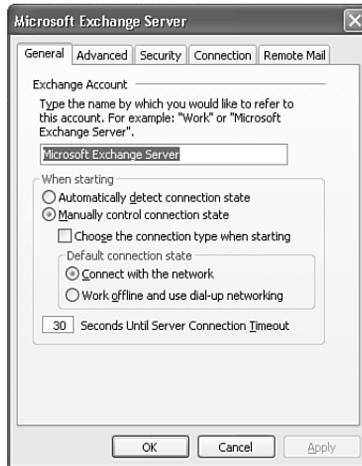
Only one Offline Folders file can be associated with an Outlook profile. This file has an extension of .ost and can store a copy of all items in your Outlook message store or only certain items, depending on your preferences.

NOTE

If this is the first time you're configuring offline access to Exchange, the other two buttons on this dialog box are disabled. If you've previously configured offline access to Exchange, you cannot use the Browse button to create a new Offline Folders file. You can click Compact Now to reduce the size of your Offline Folders file or click Disable Offline Use to work with Outlook in online mode only.

In addition to telling Outlook you want to enable offline access to your mailbox, you should also examine your connection options. These options dictate whether Outlook automatically detects your connection state (offline or online) and whether you must manually choose your connection state. To access these options, select **T**ools, **E**mail **A**ccounts, choose **V**iew or **C**hange Existing Email Accounts, and click **N**ext. Choose your Exchange account, click **C**hange, and then click the **M**ore Settings button to display the Microsoft Exchange Server dialog shown in Figure 30.9.

Figure 30.9
Use the Microsoft Exchange Server dialog box to configure Outlook startup options.



The General tab enables you to control the default startup behavior for Outlook. You can choose from the following options:

- **Automatically Detect Connection State**—Outlook will detect a connection to your Exchange Server. If no connection is present, Outlook will start in Offline mode. If a connection is detected, Outlook will start in Online mode.
- **Manually Control Connection State**—Choosing this option enables you to choose whether Outlook should connect in Online or Offline mode each time it's opened. This can be helpful if you're often connected to your Exchange Server, but still want to work in offline mode (for instance over a slow dial-up connection).
- **Choose the Connection Type When Starting**—Checking this box after selecting Manually Control Connection State enables you to choose the type of connection

Outlook uses to connect to the Exchange Server. You can choose to connect over a network or over a dial-up networking connection.

- **Default Connection State**—The last set of options in this dialog box enables you to specify the network connection you'll use most often to connect Outlook to the Exchange Server. You can choose Connect with the Network or Work Offline and Use Dial-Up Networking.

When you're done choosing your connection state and type, click OK, Next, and Finish to return to Outlook.



If you're having problems connecting to your Exchange Server and you know there's no problem with your connection, see "Server Times Out" in the "Troubleshooting" section at the end of this chapter.

START OUTLOOK IN OFFLINE MODE

If you've configured Outlook to ask you to choose a connection state when launching, it's very easy to launch Outlook in Offline mode. Simply choose Work Offline from the dialog box in Figure 30.10 and Outlook won't try to connect to the server. Even if a network connection is present, Outlook won't try to use it to connect to the Exchange Server.

Figure 30.10

This dialog appears if you tell Outlook to enable you choose the connection type when starting.



When Outlook is in Offline mode, certain features won't function. You won't be able to view free/busy data for users you want to invite to meetings. If you have integrated Windows authentication required to log on to the Exchange Server, you won't be required to input your username or password to access your Offline Folders file. Any new emails received or changes to the Global Address List won't be sent down to your computer, even if you're authenticated on the network at the time.

SET SYNCHRONIZATION OPTIONS

Now that you've set up an Offline Folders file, you must specify which of your Outlook folders are available offline. You might choose to have all folders available all the time. This is probably the best option if you're concerned about accessing all of your data when you're away from the office. However, as previously mentioned, there might be some scenarios in which you don't want to synchronize all of your mail folders.

When Outlook synchronizes data, it does so on a per-item basis. This is an improvement over previous versions of Outlook. In older versions, if you tried to synchronize the changes made when you were offline, the process could take a long time. In some cases, it would appear to hang. If you're a mobile professional on the road, it could have taken long enough

for you to cancel the synchronization. Canceling synchronization in previous versions of Outlook meant that the next time you attempted to synchronize, the process would take even longer because you had to synchronize all the items that had previously synchronized as well as the ones that had not.

Outlook 2003 remedies that situation. Synchronization state information is now maintained on a per-item basis. This makes synchronization faster as well as more reliable. If you have to cancel synchronization (which is still never a good idea), the next time you connect to Exchange, synchronization will pick up right where it left off.

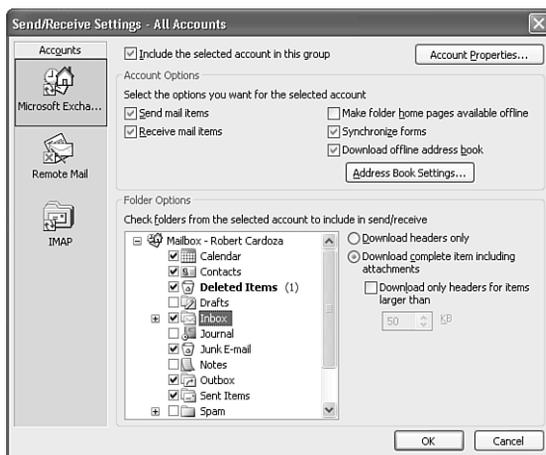
Even with Outlook 2003's enhanced message synchronization, there are reasons to make only certain folders available offline. For example, you might have a folder in which you store very large attachments. If you don't need that folder offline, you can save a lot of space in your Offline Folders file and a lot of time synchronizing all of those items when you're remotely connected to Exchange.

There are two options you can use to configure a folder for offline access. If you need to make only a single folder or two available offline, use the following steps:

1. Select the folder from the Folder List.
2. From the Tools menu, choose Send/Receive, Send/Receive Settings, Make This Folder Available Offline.

To configure synchronization options for all the folders in your mailbox, use send/receive groups. Select Tools, Send/Receive, Send/Receive Settings, Define Send/Receive Groups to display the Send/Receive Groups dialog box. Select the send/receive group you use when Outlook is online and click Edit to display the Send/Receive Settings dialog box shown in Figure 30.11.

Figure 30.11
You can customize which folders are available offline by using send/receive groups.



Select your Microsoft Exchange Server account from the Accounts listing on the left. In the Folder Options section in the bottom half of the Send/Receive Settings box, you can choose which folders you want to synchronize. Check the box next to a folder to make the folder available offline. Clear the check box next to the folder to prevent the folder's contents from being accessed offline.

If you're connecting to an Exchange 2003 Server, for the folders you choose to make available offline, you can choose how you want them synchronized. For example, if you have a folder that you use to store large attachments, you might want the header from an item in that folder to be synchronized, but not the entire item. For each folder, you can choose from the following options:

- **Download Headers Only**—Only the message header and the first 255 characters of the message body will be downloaded.
- **Download Complete Item Including Attachments**—All items in the folder will be downloaded regardless of size.
- **Download Only Headers for Items Larger Than**—If you choose to download the complete item, you can check this box to prevent extremely large items from being downloaded under any circumstances. Check the box and enter the number of KB that you want as the cut-off point for a full item download. The size of the item will depend on the type and speed of connection you will normally have to the Exchange Server and how much of the data you want to take with you.

NOTE

If you're connecting to an earlier version of Exchange Server, you cannot choose the type of synchronization. You're limited to downloading the full item, including attachments.

When you've finished specifying the settings for each folder you want to access offline, click OK and then Close to save your changes. After you make your changes, it's a good idea to perform a manual Send/Receive to ensure that any folders that were previously unavailable offline are now available. To perform a manual Send/Receive, press F9.

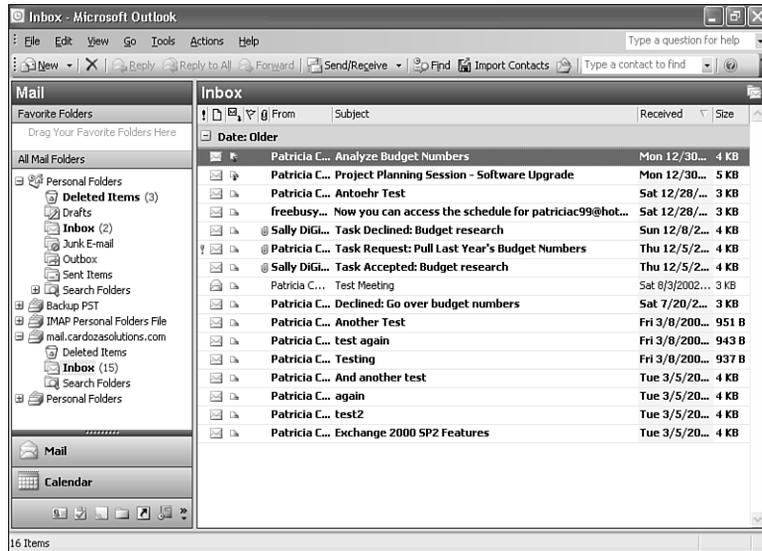
The next time you open Outlook in offline mode, you'll have access to only the items in the folders you chose in the Send/Receive Settings dialog box. Figure 30.12 shows a folder with only message headers. If you want to view the entire item later, you can right-click on the item and select Mark to Download Message. The next time you connect to the server, the entire message will be downloaded and available offline.

CONFIGURE AN OFFLINE ADDRESS BOOK

Reading and responding to messages offline can be very helpful, but you'll probably also want to send messages to other users in your Exchange organization. You must configure an offline address book (OAB) if you want to access the Global Address list while offline from Exchange. You can choose to update the Offline Address Book at any interval you specify. If your Global Address List doesn't change very often, you can probably get by with

downloading the Offline Address Book every other week or even once a month. If the Global Address List changes very frequently, you'll probably want to download the Offline Address Book more often.

Figure 30.12
Only message headers are downloaded for the Large Attachments folder.



You can configure an automatic synchronization of the Offline Address Book or perform a manual synchronization if you know a change has recently been made. The Offline Address Book is automatically downloaded when you choose to create an Offline Folders file. However, you can manually update the Offline Address Book whenever you are online and you can configure when the Offline Address Book downloads to keep it up to date.

MANUALLY DOWNLOAD THE OFFLINE ADDRESS BOOK

If your company has recently added or lost employees and you know that your copy of the Offline Address Book is outdated, you can manually download it anytime you're connected to the Exchange Server. To manually download the Offline Address Book, use the following steps:

1. Choose **T**ools, **S**end/Receive, **D**ownload Address **B**ook to display Figure 30.13.
2. Choose from the following options:
 - **D**ownload **C**hanges Since Last Send/Receive—This option is fairly self-explanatory. The only downloaded changes are those that happened since the last time you performed a Send/Receive operation. If you want to download the entire Offline Address Book, clear this check box.
 - **F**ull **D**etails—This option downloads all address information, including phone, fax, department, and office location. Selecting this option also downloads users' digital signatures.

- **No Details**—Downloads only names and email addresses. No additional information is synchronized between the server and Outlook 2003.

Figure 30.13
Use this dialog box to specify options for downloading an updated copy of the Offline Address Book.



3. Choose the address list you want to download—In most cases, the address list you want will be the Global Address List. Your Exchange administrator might have configured additional address lists, however. If you want to download the details for a different address book, use the drop-down list to choose the address book you want.
4. Click OK to download the Offline Address Book.

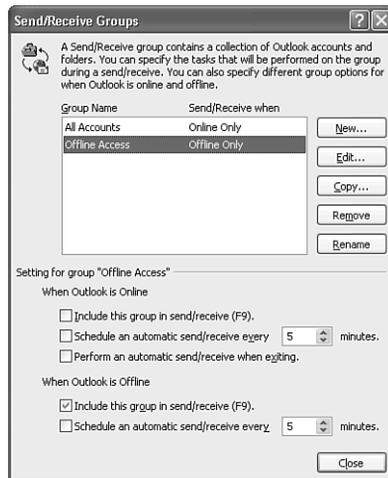
You can perform these manual steps whenever you know the Offline Address Book is out of date with the Exchange Server.

AUTOMATICALLY DOWNLOAD THE OFFLINE ADDRESS BOOK

You can use send/receive groups to choose how often the Offline Address Book is automatically synchronized with your computer. To customize the automatic download of the Offline Address Book, use the following steps:

1. Choose **T**ools, **S**end/Receive, **S**end/Receive Settings, **D**efine **S**end/Receive Groups to display the Send/Receive Groups dialog box (see Figure 30.14).
2. Choose the send/receive group that you use when Outlook is online and click **E**dit to display the Send/Receive Settings dialog box shown in Figure 30.9.
3. Make sure that the box marked **D**ownload **O**ffline **A**ddress **B**ook is checked.
4. Click the **A**ddress **B**ook **S**ettings button to display the Offline Address Book dialog box shown in Figure 30.11.
5. Choose the options for downloading the Offline Address Book and click OK.
6. Click OK again to return to the Send/Receive Groups dialog box.

Figure 30.14
Use this dialog box to define and configure your send/receive groups.



7. You can specify the frequency of automatic send/receives. If you routinely work offline with Outlook, you should probably choose Perform an Automatic Send/Receive When Exiting.
8. Click Close to save your settings and return to Outlook.

Every time you synchronize this send/receive group (either when you exit or when you press F9 on the keyboard), Outlook downloads the Offline Address Book according to the settings you chose. If you want to download the Offline Address Book only when you exit and don't want to spend the time or bandwidth to update the OAB when the rest of your folders are updated, you can create a separate send/receive group that doesn't include any folders. Remove the OAB synchronization from your default send/receive group and configure your Offline Address Book send/receive group to synchronize only when Outlook exits. By doing so, you'll always have an updated Offline Address Book, but you'll spend the time and bandwidth only when Outlook is exiting.



If you're using Cached Exchange mode and are trying to download the Offline Address Book without success, see "Offline Address Book Doesn't Update in Cached Mode" in the "Troubleshooting" section at the end of this chapter.

WORKING WITH REMOTE MAIL

In addition to Cached Exchange mode and traditional offline/online access to Exchange, you can also configure Outlook for Remote Mail. Remote Mail is a specialized type of offline access that enables you to connect to a server, download the headers for new messages, and then disconnect from the server. You can then review the message headers at your leisure and decide which ones you want to download, which should be deleted immediately, and which should remain not downloaded on the server until you return to the office. You can then reconnect to the server and download the messages you've marked for

retrieval, delete the messages you've marked for deletion, and leave the remaining messages. Remote Mail depends on you taking action on each message header. That action can be to download, delete, or ignore.

Remote mail is useful in many situations. Some cellular data plans (most notably GPRS plans) require you to pay connection fees per megabyte of data you download. In that scenario, connecting to the server using one of the options previously discussed might result in more than 5MB of data being synchronized between the server and the client. With data plans as high as a dollar per megabyte in some locations, that could result in a \$5 charge every time you connect to your mailbox. Over time, those charges can really add up.

Another scenario in which Remote Mail makes sense is on a very slow connection. I once took a trip to South Dakota. I had a wonderful time, but one hotel I stayed at had very poor telephone lines. I was able to make only a 14.4Kbps connection to the Internet. I then tried to download approximately 1MB worth of Outlook data. If I hadn't known approximately how much data was there and cancelled the download, I would have been connected for more than 3 hours.

Remote mail can also be very useful if you know you have a message (or multiple messages) with large attachments waiting on the server, but you still want to be able to retrieve some critical mail. If you're just using Offline access to Exchange and haven't configured Outlook to download only headers on messages over a certain size, you'll have to go get all the messages on the server, including the attachments, to retrieve that one critical message from your boss. With Remote Mail, you can connect, download all headers, and mark only the critical messages for download, leaving the others on the server for retrieval when you're back in the office on the LAN.

The last main scenario for Remote Mail involves a corrupted message. Even though Outlook 2003 and Exchange Server 2003 offer greater message integrity through the use of compression, it's still possible that you might end up with a corrupted message one day. One corrupted message might prevent Outlook from downloading the rest of the message in your Inbox. With Remote Mail, you can connect, mark the corrupted header for deletion, and delete it from the server.

REMOTE MAIL VERSUS OFFLINE FOLDERS

Even though the two processes sound similar and do bear some similarities, they offer different functions. You might want to consider using both approaches in different situations. You should use offline folders to synchronize your Outlook data to your local machine. While you're out of the office, use Remote Mail to work with headers without downloading their respective messages.

NOTE

You can actually achieve nearly the same behavior using offline folders as with Remote Mail. You can configure a send/receive group to download only headers. The only reasons you might not want to do this is that you have to enable or disable the send/receive group if you want the full items, or you need to go through and mark all messages for download.

SETTING UP REMOTE MAIL DOWNLOAD OPTIONS

To use Remote Mail, you must configure your Exchange account for offline access and create an Offline Folders file. If you don't want to add an Offline Folders file, you can add a Personal Folders file to your account and configure it as your default delivery location for new messages.

CAUTION

If you decide to configure a Personal Folders file as your default delivery location, be aware that all new messages will be transferred from the server to your Personal Folders file. You'll lose the benefits of storing your mail on the server, such as Outlook Web access and routine backups of your mailbox.

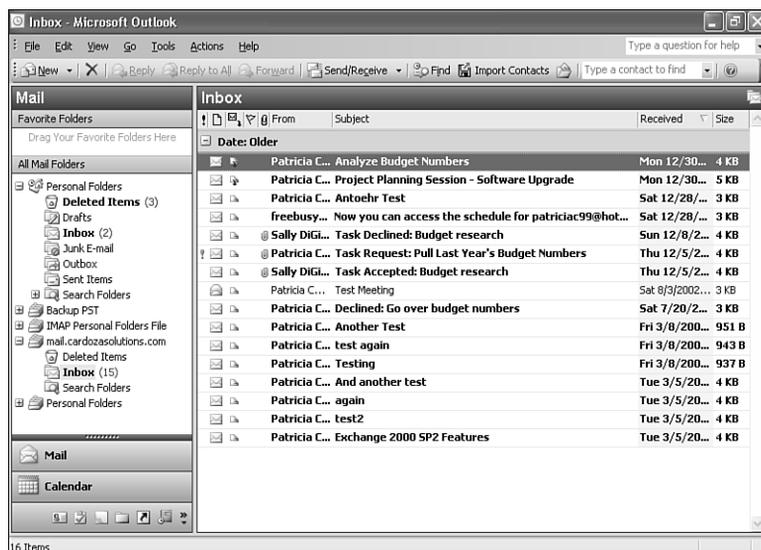
To configure Outlook for offline access and configure an Offline Folders file, see the previous section, "Configuring Offline Access to Exchange." Once you've configured offline access, you can start working with Remote Mail. Use the following steps to download only message headers for an account:

1. Choose **T**ools, **S**end/Receive, **W**ork with **H**eaders, **D**ownload **H**eaders.
2. If you have multiple accounts, you can choose the account you want to download headers from. You can choose to download headers from **T**his **F**older, **A**ll **A**ccounts, or a specific account.
3. Outlook then performs a send/receive operation, but downloads only the headers for the account or folder you chose.

Once you've downloaded headers for an account, you'll see a view similar to Figure 30.15.

Figure 30.15

The symbol of a message header is a short piece of paper with a corner folded over.



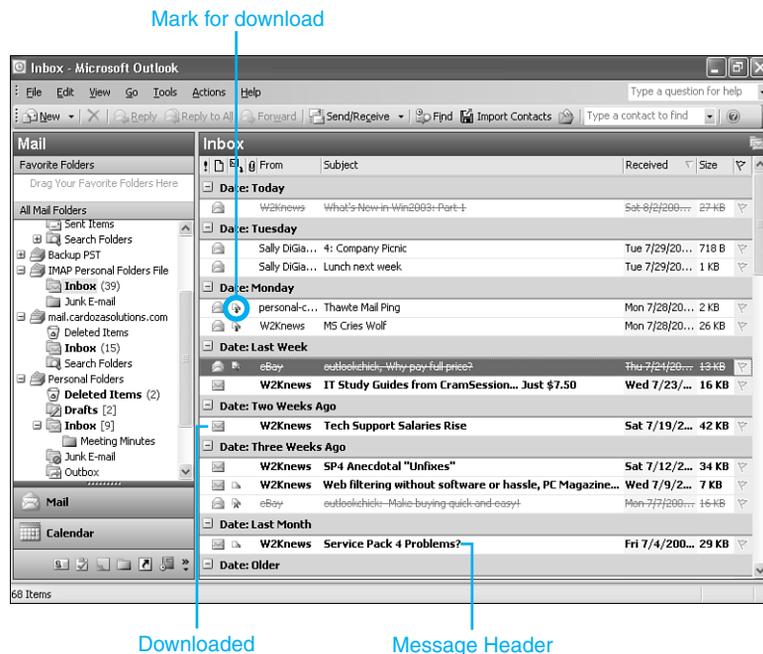
You can then choose what to do with each downloaded header. You can work with message headers individually or within a group. To work with a group of messages, use the Ctrl or Shift key to select multiple messages. Whether you select one or many messages, you can choose from the following options available from the **T**ools, **S**end/Receive, **W**ork with **H**eaders, **M**ark/Unmark Messages fly-out menu:

- **M**ark to **D**ownload Messages—This option tells Outlook to retrieve the entire message from the server the next time you initiate a send/receive. You can also access this option by right-clicking on the selected message(s) and choosing **M**ark to **D**ownload Messages.
- **D**elete—Choosing this option deletes the messages from the server the next time you connect to the server.
- **U**nmark **S**electd Headers—If you marked a header for download or deletion and you decide you don't want to perform the previously chosen action, you can choose **U**nmark **S**electd Headers to return your message header back to its original state. You can then either leave it unmarked or mark it with a different action.
- **U**nmark **A**ll Headers—This option unmarks all headers.

After you've marked messages for download, their icons will change, as shown in Figure 30.16.

Figure 30.16

This figure shows two messages marked for download, two message headers, and five messages that have been fully downloaded from the server.



When you've taken action on the message headers you need, you can connect to the server and act on your marked items by selecting **T**ools, **S**end/Receive, **W**ork with **H**eaders,

Process Marked Headers. You can again choose to process headers from this folder, all accounts, or a particular account.

TROUBLESHOOTING



SERVER TIMES OUT

I've configured a dial-up connection to my Exchange Server. However, I'm using a cellular modem to connect to the Internet and my connection is very slow. Because of this, I often have to click Retry several times when attempting to launch Outlook. Is there any way I can fix this?

Definitely! If you routinely use a slow connection, you can increase the server timeout value for your dial-up connection to Exchange. Simply select **T**ools, E-mail **A**ccounts, **V**iew or Change Existing E-Mail Accounts and click **N**ext. Select your Exchange Account and click **C**hange. Click the **M**ore Settings button to display the figure shown in Figure 30.9. You can change the timeout value in the last box on the General page. If 30 seconds is too short for a timeout value, consider changing the value to 60 or 90 seconds. If that doesn't solve your problem, contact your network administrator.

OFFLINE ADDRESS BOOK DOESN'T UPDATE IN CACHED MODE

I'm working with Outlook in Cached Exchange mode. I know my Exchange administrator has made changes to the Global Address List, but no matter how many times I try to download the Offline Address Book, I don't see the changes. Why not?

Cached Exchange mode can occasionally cause problems, especially when connecting it to an Exchange 5.5 or Exchange 2000 Server. The easiest way to guarantee that you'll get the most recent updates is to go into your Exchange account settings and disable cached mode. You can then restart Outlook and download the OAB. Change your settings back to cached mode and restart Outlook again. This process also works if you have an item in a folder that isn't updating down to your cache. Although this isn't the perfect solution, it will accomplish what you want.

IMPROVING YOUR OUTLOOK

Using Outlook while away from the office can greatly enhance your productivity. If you routinely travel for business, you can work on the plane, in the airport, or in the hotel. Even when traveling for pleasure, you'll often need to check in with the office and download critical email. You can use all or some of the methods outlined in this chapter to configure offline access to Exchange Server. Depending on your version of Exchange Server, you have such varied options as VPN, RRAS, and RPC over HTTP. The following scenario revisits Christine, the busy Customer Service manager who needs to take a few days off while her kitchen is being remodeled. She must be at home during the renovations, but she must also remain connected to her office so that she can monitor her department's needs.

Christine is a highly technical, highly available manager. She holds weekly department meetings and keeps in touch with her department members, who are scattered in three different physical locations within the same city, primarily via email. Christine uses NetMeeting and Shared Meeting Workspaces of SharePoint Team Services for all of her collaboration needs. She has DSL Internet access at her home, and will be away from the office for five days during the kitchen remodel. During that time, Christine needs to hold several meetings, schedule employee reviews, and keep up with her email in general.

Christine has configured her Outlook 2003 in Cached Exchange mode. This enables her to unplug her ultra-light laptop at any time and take it into meetings or into another office for some one-on-one discussion with a colleague. She also takes her computer home every night to answer the emails she didn't get a chance to answer during the day. That's normally all the offline access Christine needs. However, for the next five days, she'll need an easy and reliable method to connect to her corporate network so she can receive her email in real time.

NOTE

Christine could always simply use Outlook Web Access (OWA) to connect to her email. However, Christine really likes using Outlook 2003 and would prefer to not switch back and forth between the full Outlook client and the slightly less functional browser client.

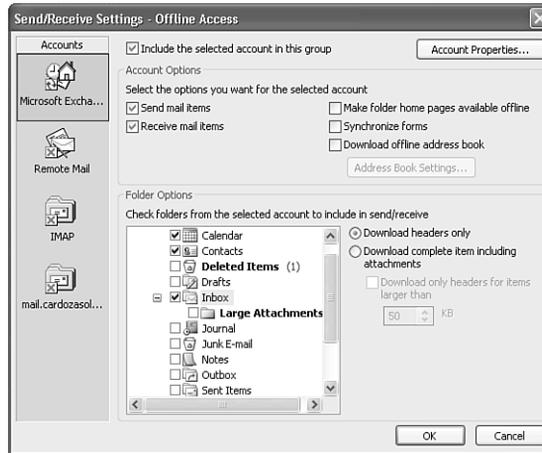
Christine has decided to configure a VPN connection to her server. Her network administrator has given her a copy of their hosts file to put on her computer. She copies that file on her computer in the `C:\Windows\System32\Drivers\ETC\` directory. When she's done with that, Christine is ready to configure her VPN connection. She follows the instructions provided by her network administrator, and is soon connected to her corporate network.

Now that she's connected, Christine can simply open Outlook as she normally does and work with all the items in any of her Outlook folders.

If Christine were working over a dial-up connection, her preferred choice might be different. In that case, she would probably want to configure a send/receive group to download only message headers. To do this, Christine would use the following steps:

1. Select **T**ools, **S**end/Receive, **S**end/Receive Settings, **D**efine **S**end/Receive Groups to display the Send/Receive Groups dialog box.
2. Click **N**ew to create a new send/receive group. Name the send/receive group **Offline Access** and click **O**K to display the Send/Receive Settings dialog box shown in Figure 30.17.
3. Select the Exchange account and click **I**nclude the Selected Account in this Group.
4. Choose the folders necessary for synchronization. Christine probably wants her Calendar folder, Inbox, Tasks, and Sent Items.

Figure 30.17
Christine can create a send/receive group to download only headers from her Inbox.



5. For each folder, Christine must choose whether to download headers or complete items. For most folders, Christine should choose headers only to save time and frustration while using a dial-up account.
6. Click OK to save changes and return to the Send/Receive Groups dialog box.
7. Click Close to save changes.

Now Christine can connect and work only with her offline send/receive group. She can connect to the server, download only headers, and then decide what to do with each header she downloads. She'll probably want to immediately delete some messages. She'll leave others for when she returns to the office, and she'll mark still others for download so she can read, respond, reply to, or forward the messages to another individual. Using send/receive groups and offline access, Christine can keep up with her busy schedule while still being home to advise the contractors on her kitchen remodeling.